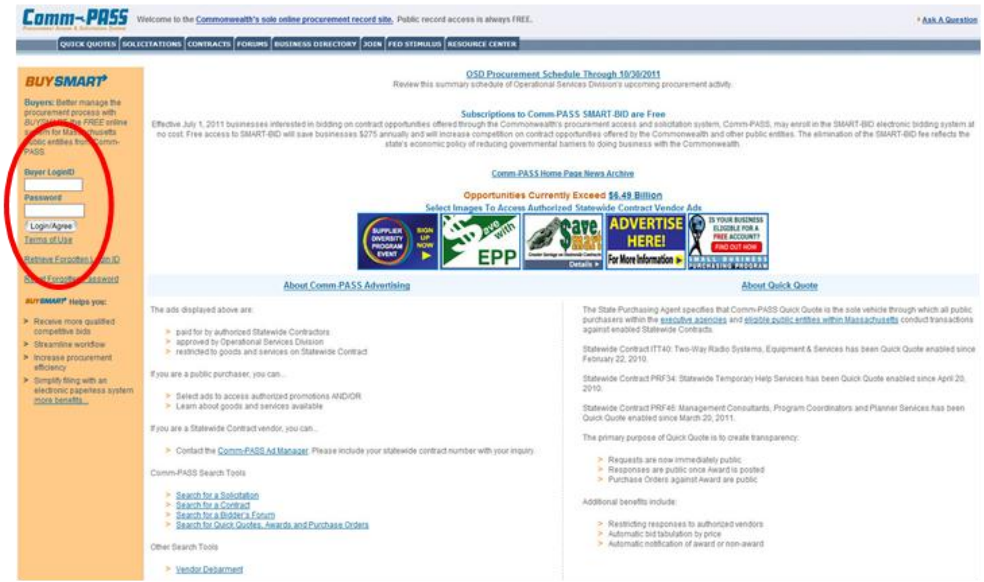
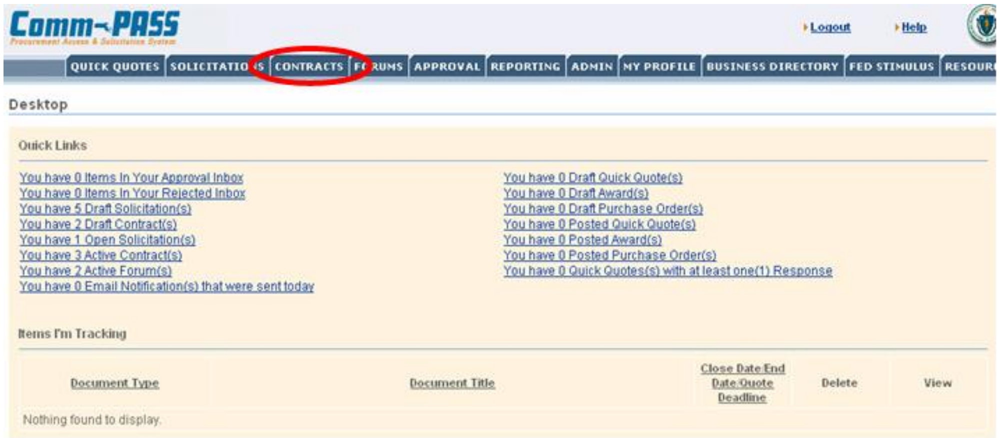
OPERATIONAL SERVICES DIVISION

Job Aid:
How to Create a Contract

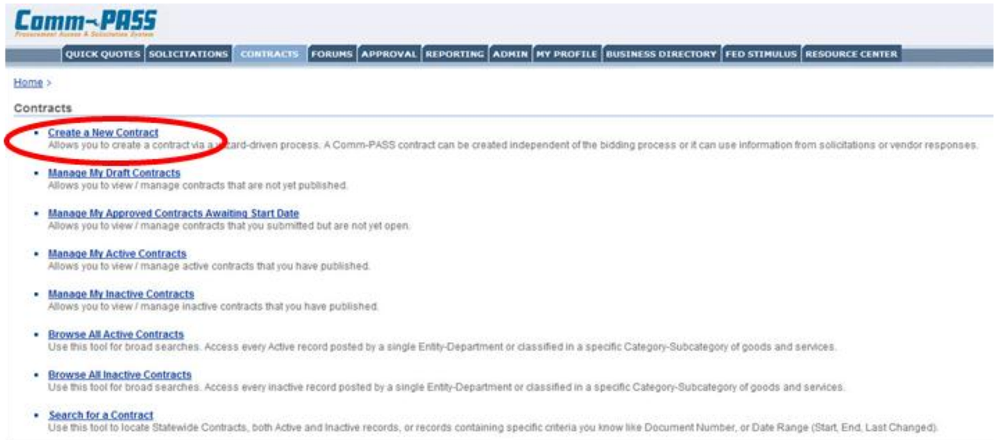
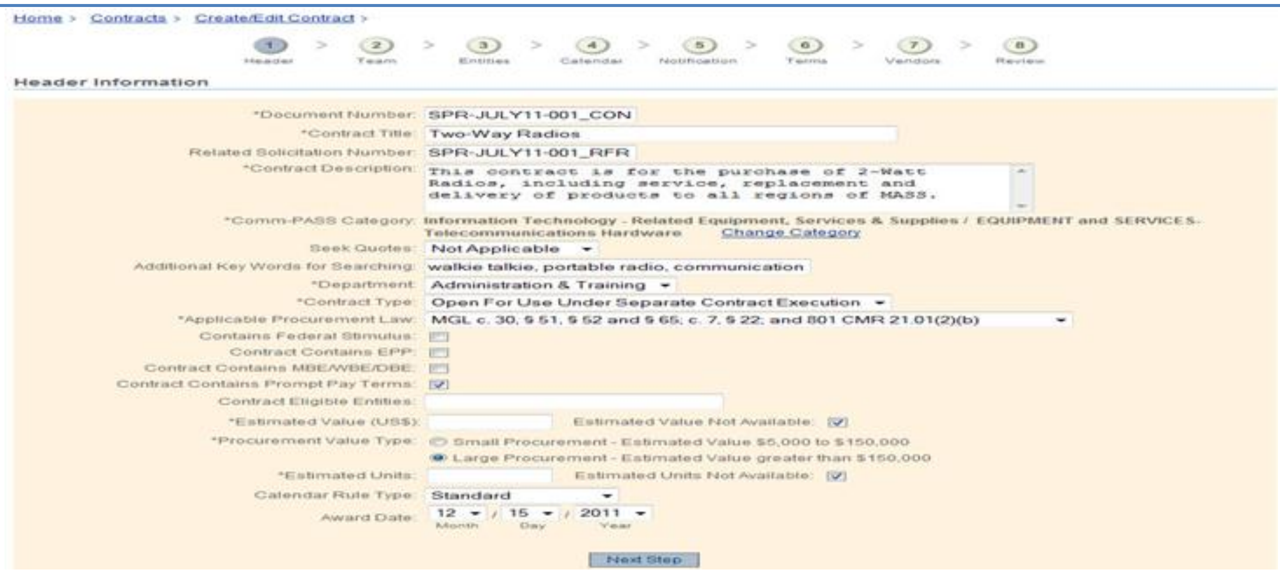
Please Note: You must have a BuySmart Subscription and be logged in to perform this task. Before you begin, have all the information you need for posting ready. This may include:

- Screen print of the solicitation
- Contract Document Number
- Final RFR (and additional documents for upload)
- Sourcing Lead/Contract Manager contact information
- Vendor name, contact information, and price list (if available)

<table>
<tr><th>Step</th><th>Screenshot</th><th>Directions</th></tr>
<tr><td>1</td><td>
</td><td>Log into your BuySmart account.</td></tr>
<tr><td>2</td><td>
</td><td>Select the Contracts tab.</td></tr>
</table>

OPERATIONAL SERVICES DIVISION

Job Aid:
How to Create a Contract

<table>
<tr><th>Step</th><th>Screenshot</th><th>Directions</th></tr>
<tr><td>3</td><td>
</td><td>Select the Create a New Contract link.</td></tr>
<tr><td>4</td><td colspan="2">

<u>Header Information</u>

Enter Required (*) Information. Refer to screen print from solicitation.

Document Number is the record number and is the same as the solicitation document number. Once the record is created, users can search by this number. This number is case and space sensitive.

Contract Title is the name of the record. This will be displayed during search results and on the summary page.

Related Solicitation Number is required for Executive departments (and considered best practice for all other users). This piece of information assists a user trying to locate an associated record through the Search and Browse/View capabilities.

Contract Description – enter a few sentences for a brief overview of the contract. Provide enough information to give purchasers an idea of what this contract provides. Do not put all of the specifications of the contract here. The detailed description should be in the Request for Response (RFR).

Comm-PASS Category – choose the category you want this contract to display in when users are browsing by category.</td></tr>
</table>

OPERATIONAL SERVICES DIVISION

Job Aid:
How to Create a Contract

Step	Screenshot	Directions

Select a Category/Subcategory, select the ☑ next to the category which best defines your procurement, select a subcategory from the list of associated subcategories. Vendors with similar Category/Subcategory selection will be notified when this contract is posted.

Additional Key Words for searching Executive departments; must contain at least the Contract Manager's name and commonly used terms for commodities and services sought in this field. Key words assist potential bidders with locating the opportunity. Separate keywords with commas to provide a user-friendly display.

Department defaults to your department.

Contract Type users have four options for this selection
1) *Open for Use Under Separate Contract Execution* (also referred to as Single Department Procurement/Multiple Department User Contract). Any entity other than the issuer must first negotiate separate terms with an awarded vendor.
2) *Open to All Eligible Public Entities* (also referred to as Statewide Contract). Procured by OSD or OSD-designated department on behalf of all state departments.
3) *Restricted to Use by Defined Entities Only* (also referred to as Multiple Department Procurement/Limited Department User Contract). Defined public entities are allowed to purchase under the terms and conditions of the resulting contract.
4) *Restricted to Use by Issuing Entity Only* (also referred to as Department Contract). Only the issuing entity may purchase under the terms and conditions of the resulting Contract.

Applicable Procurement Law Select the law that governs your procurement.

Contract Contains EPP This checkbox should be selected to alert users the contract specifications has environmentally preferable products and/or services.

Contract Contains MBE/WBE/DBE This checkbox should be selected to alert users the contract specifications have minority, women, disabled or disadvantaged, and/or veteran business enterprise partnership.

*If you are an executive agency, do not use this checkbox. This icon supports those public entities outside the executive departments who may need to associate an awarded Vendor with disadvantaged enterprise programs on the federal or local level, which are not associated with SDO certification.

Contract Contains Prompt Pay Terms This checkbox should be selected to alert users that your contract specifications offer a Prompt Payment Discount.

Contract Eligible Entities Enter all the entities eligible to use this contract. This field will not be available if you selected *Restricted by Issuing Entities Only* under the **Procurement Type** dropdown.

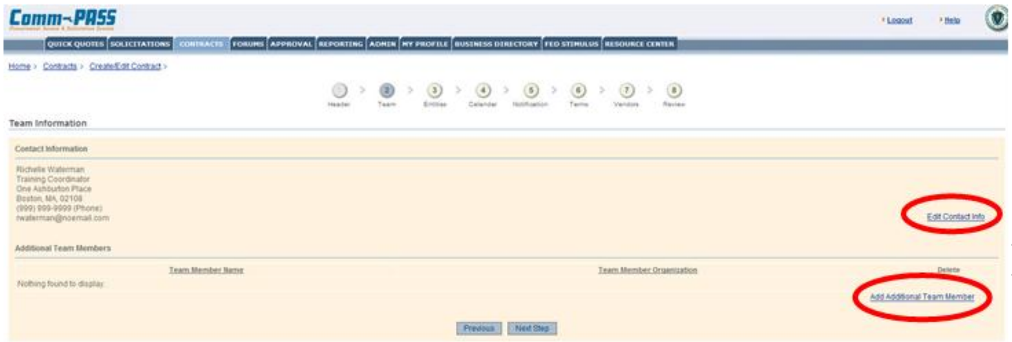
Estimated Value (US$) and Estimated Units Executive departments must enter these values. The values may remain equivalent to the Solicitation except when 1) zero was based on negotiating strategy 2) updated information becomes available prior to contract publication on Comm-PASS.

Procurement Value Type Executive departments must select procurement value type for small procurements $10k -$150k or large procurements over $150k.

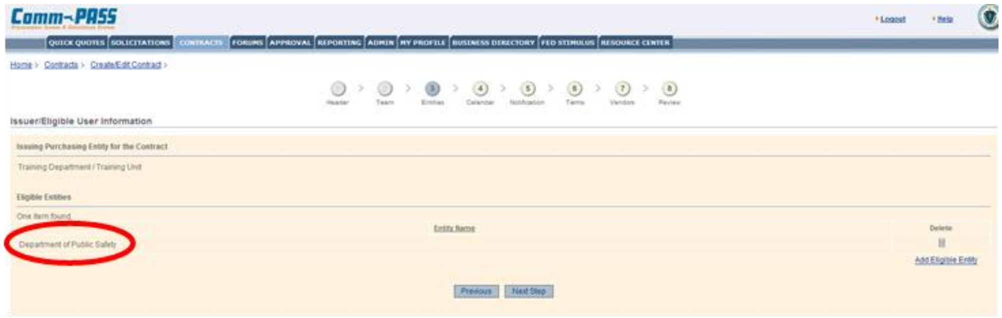
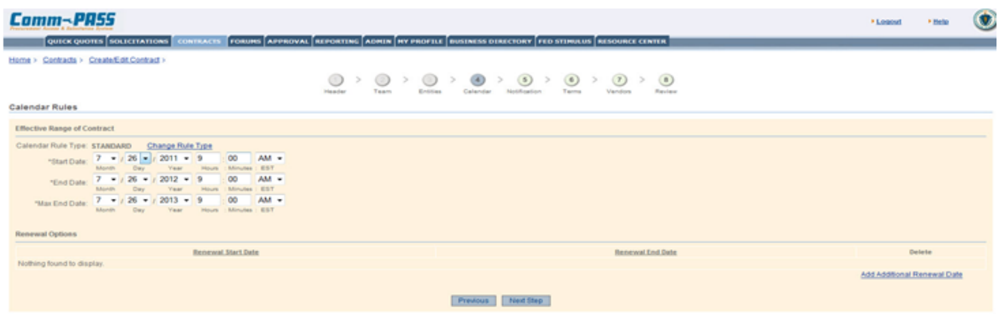
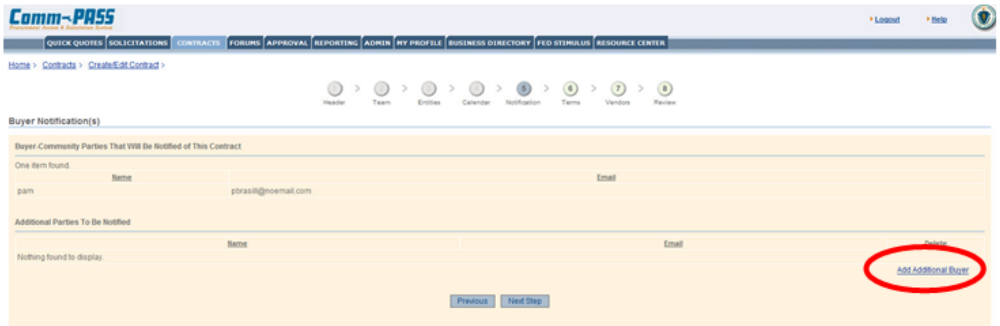
Calendar Rule Type Users have three options for this section 1) *Standard* – You intend to accept only those bids submitted prior to the close date. 2) *Open Enrollment* – During the life of the related Contract, you intend to re-open and close to consider additional bids. 3) *Rolling Enrollment* – During the life of the related Contract, you intend to award qualifying vendors until the Final Submission date.

Award Date this field should contain the date the contract was awarded. This is not the start date of the contract. Select **Next Step.**

Job Aid:
How to Create a Contract

Step	Screenshot	Directions
5		**<u>Team Information</u>** The contact information that defaults belongs to the User and will be listed under the Issuer's Tab in the posting. To change contact information, select the **Edit Contact Info** link. You can add additional team members by selecting the **Add Additional Team Member** link. Select **Next Step**
6		**<u>Issuer/Eligible User Information</u>** If you wish to identify other eligible entities that may use this contract, you can add them by selecting the **Add Eligible Entity** link. If not, select **Next Step** and move onto Step 9.
7		Enter the Entity Name and select **Save Eligible Entity** link.

Job Aid:
How to Create a Contract

Step	Screenshot	Directions
8		You will now be able to view the Entity listed. Select **Next Step**.
9		<u>**Calendar Rules**</u> Review **Calendar Rule Type** to ensure it is correct. Set a **Start Date** (the first date the contract is available for use), **End Date** (the last date of the contract without renewal options), and **Max End Date** (the last date of the contract, including renewal options). Select **Next Step**.
10		<u>**Buyer Notification**</u> Required Buyer Notification will be listed at top of this screen. This information is set up by the Administrator and cannot be edited. Additional Buyer Notification can be used if you need to notifiy others interested in this contract. Select **Next Step**.

OPERATIONAL SERVICES DIVISION

Job Aid:
How to Create a Contract

Step	Screenshot	Directions

11

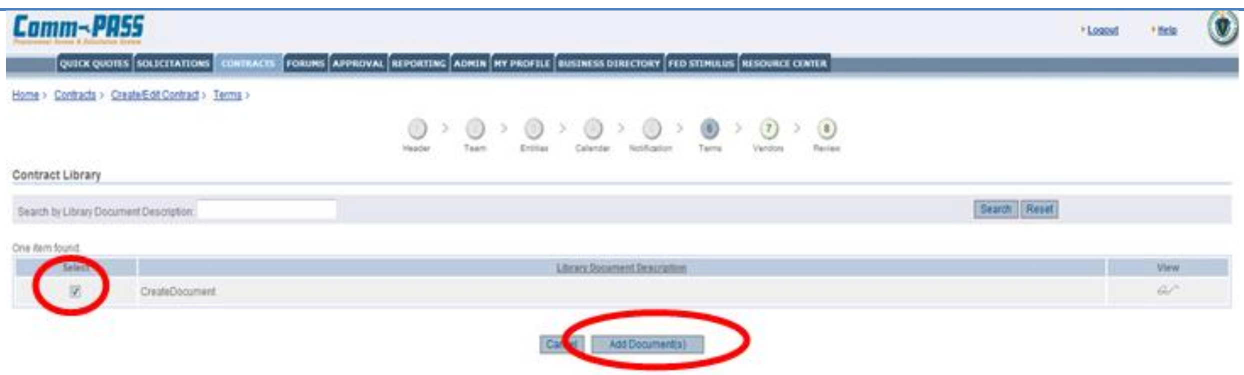
Terms

At this step, you will be able to view documents that are defaulted to every posting. Review the documents to ensure you have all the documents required for this posting. If you need to upload other documents you have two selections:
Add Attachment from Contract Library allows you to select a document for a library of documents set up by your Adminstrator.
Add Attachment from Another Location allows you to browse for the document you need to attach to this posting.
Add Attachment from Solicitation allows you to add documents from the related solicitation.

Examples of documents to be added are: purchase order forms, statement of work templates, terms & conditions (cities & towns).

If you do not need to add documents to the **Forms & Terms** tab.
Select **Next Step** to move onto Step

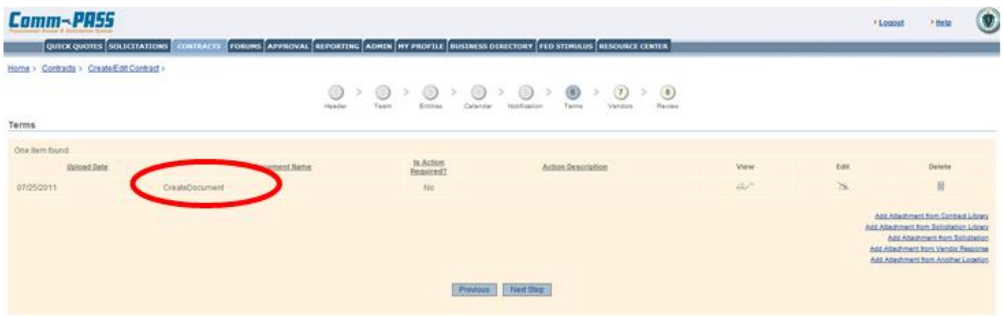
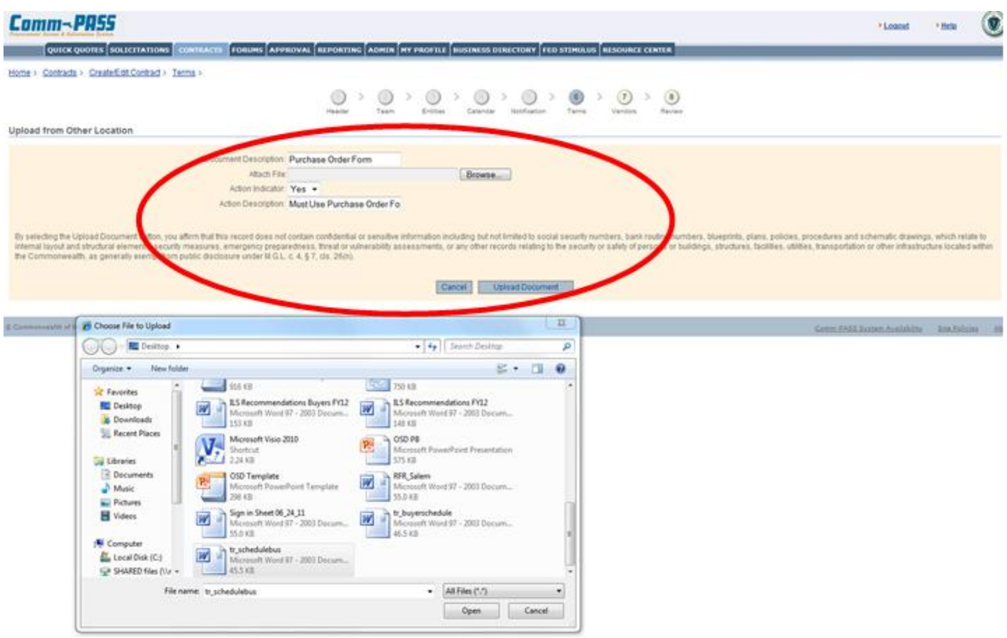
12



If you selected from the **Add Attachment from Contract Library**, select all the files and forms that are needed for the contract. This list could include (but is not limited to) RFR, modifications and/or amendment documents and any department specific forms. It is good practice to include Commonwealth Terms and Conditions, Standard Contract Form and W-9 in case a vendor changes their name, location, phone or other contact information, these files will need to be filled out again. Uploading these types of documents are considered to be a "Best Practice". By having them available on the 'Forms & Terms' page of the contract, the responsibility is placed in the hands of the vendor to update the information for you.

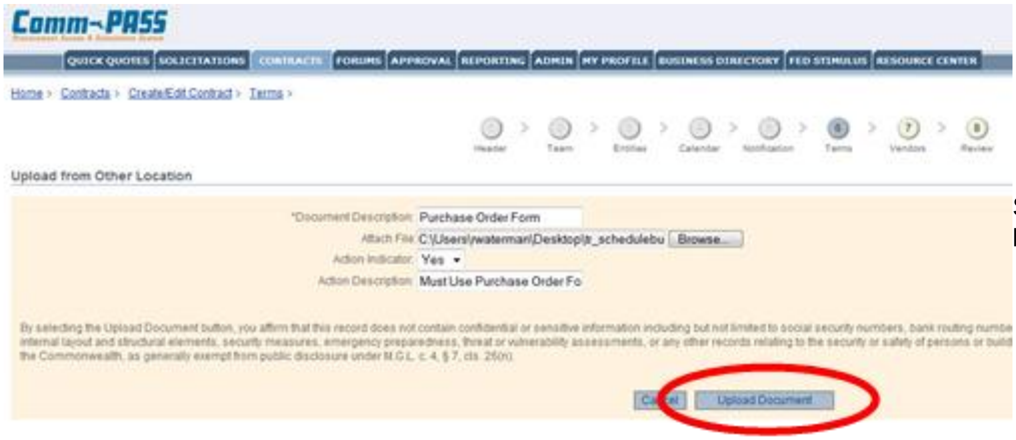
Select **Add Documents**.

Job Aid:
How to Create a Contract

Step	Screenshot	Directions
13		The document(s) selected will now appear. If an edit needs to be made to the document name, select the Edit icon to change the document name.
14		Add Attachment from Another Location – proper file names and size requirements must be used or file will not upload. When you select **Add Attachment from Another Location** you will be able to Browse for the document. You must provide a Document Description. This description provides the bidder with an idea of what the document is. You will have an opportunity to identify the document as a document that requires "Action" and you can provide a description of what you want the bidder to do with the document. Remember, the document must be saved as without spaces or special characters or you will receive an error message.

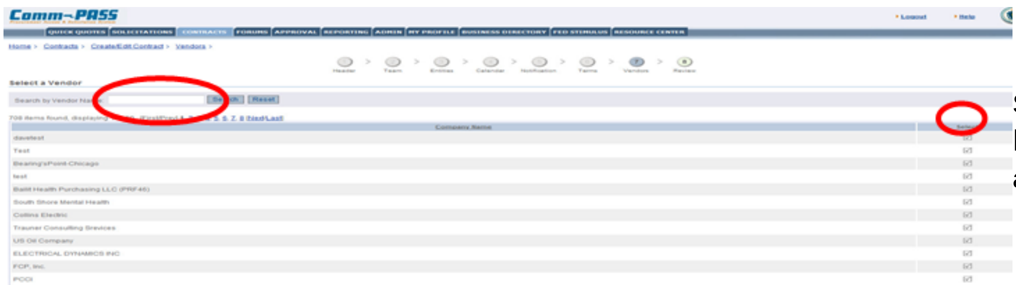
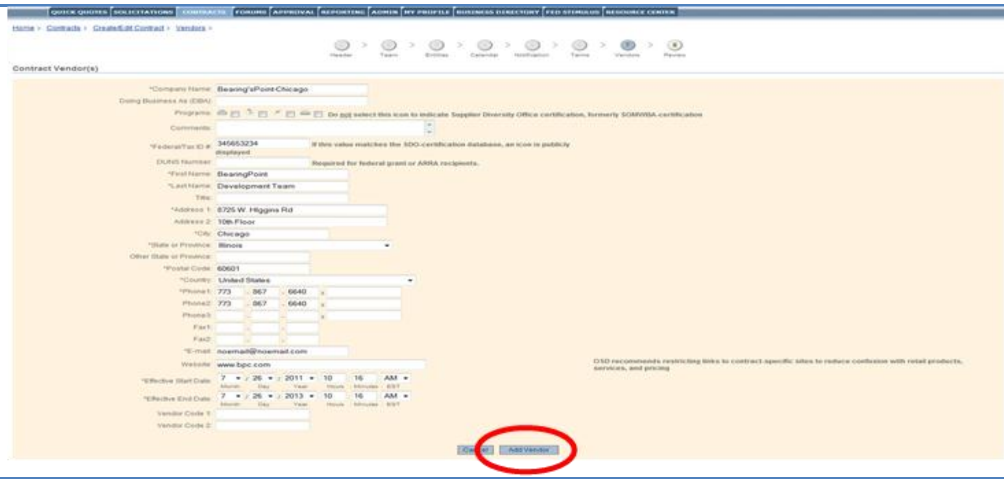
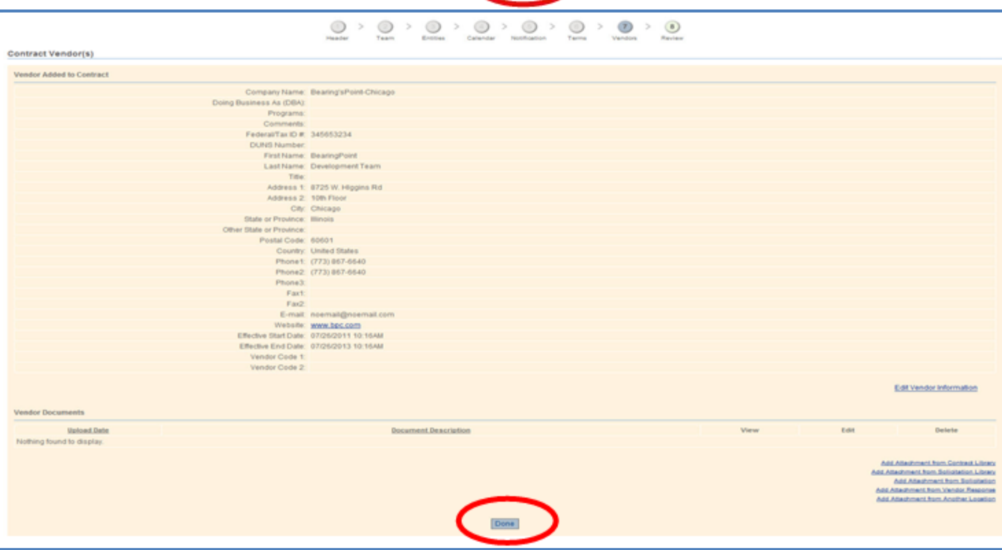
OPERATIONAL SERVICES DIVISION

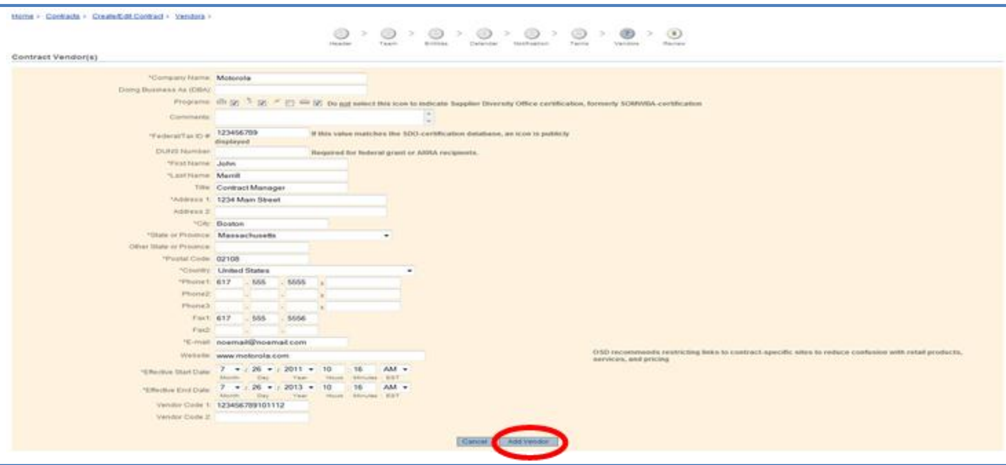
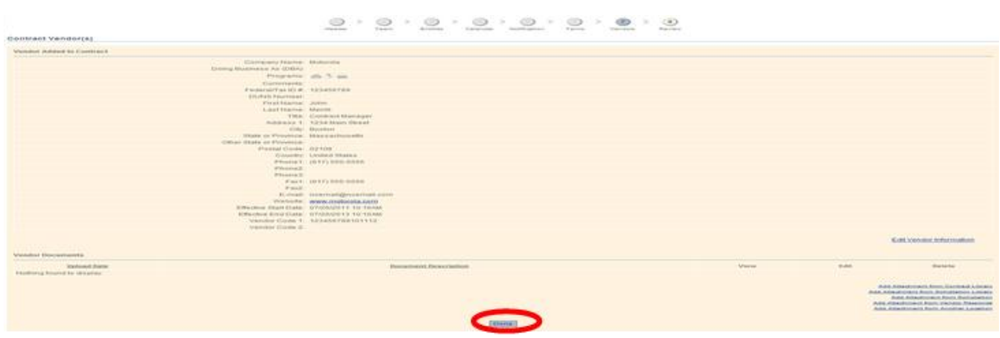
Job Aid:
How to Create a Contract

Step	Screenshot	Directions
15		Select the **Upload Document** box to continue.
16		The selected forms are listed. If you want to change the Action and/or Action Description, select the Edit icon. Select **Next Step**.
17		<u>**Contract Vendors**</u> Select the **Add Subscribed Vendor** link. You can search for a business by vendor name using the **Search by Field**. A Subscribed Vendor has the ability to list their business in the Comm-PASS Business Directory and track their bids online. They are also alerted of new postings, amendments or updates to solicitations and contracts that meet their profile. By choosing a subscribed vendor, their contact information will automatically populate.

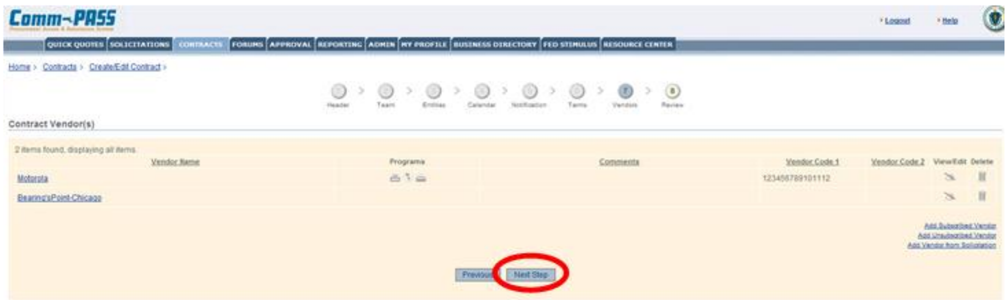
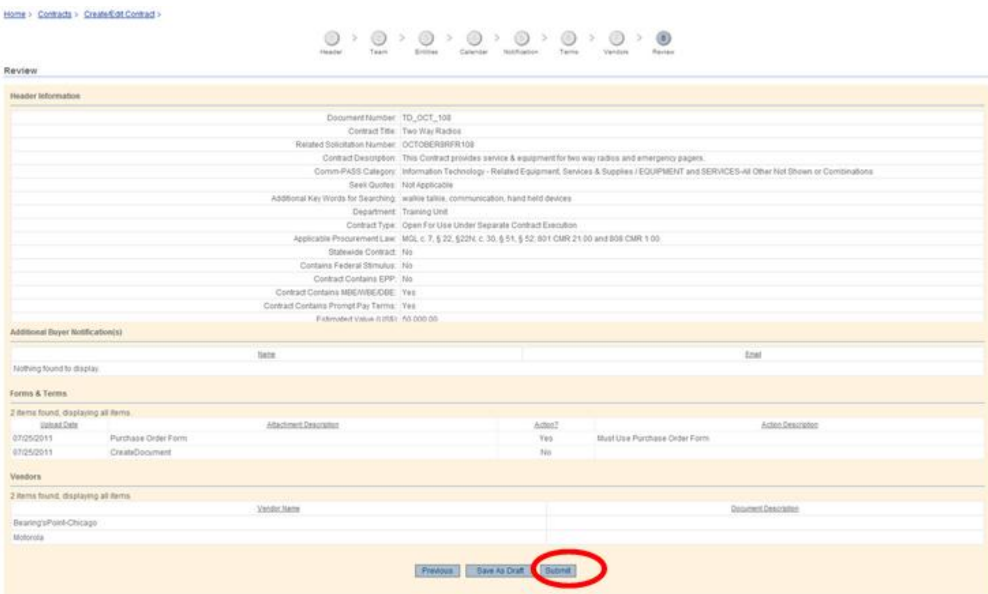
OPERATIONAL SERVICES DIVISION

Job Aid:
How to Create a Contract

Step	Screenshot	Directions
18		Select the Checkbox icon ☑ to choose a vendor to add.
19		Review vendor's contact information and enter **Effective Start & End Date**. If the vendor is participating in one of the OSD Programs, select the appropriate Program indicators.
20		Select **Done** to save the vendor's information. These details will appear on the **Vendor** tab for the record.

Step	Screenshot	Directions
21		If the vendor does not have a SmartBid subscription, you must manually enter in the vendor's details. It is important to have the correct FEIN# for the vendor. It is the poster's responsibility to make any necessary updates to the vendor's contact information by selecting the **Managing My Active Contracts** link. You can add attachments to the vendor's details by selecting the appropriate attachment link and uploading the document.
22		Enter the vendor's information and select **Add Vendor.**
23		Select **Done.**

Job Aid:
How to Create a Contract

Step	Screenshot	Directions
24		Each vendor added will be listed and will include an icon for any program participation. Select the Edit icon to make changes or select the trash can to delete the vendor. If no changes are needed, select **Next Step.**
25		**Review** Review each section's details for accuracy. You will be able to see details for each step in the wizard completed, including any attachments. You can select the **Previous** box to work your way backwards through the wizard to make changes if necessary. You can select **Save As Draft** to work on the record at a later time or review the record in the way it would appear on Comm-PASS or you can select **Submit to Post** (if you select Submit it will take a moment to post live on the site; any changes needed will require an Amendment to the posting). If there is an approval workflow assigned, the record will not post until approved by the approvers. *PRINT THIS SUMMARY PAGE FOR YOUR RECORDS.